

# How to Use Business Process Procedures in uPerform

1. From the SCEIS Homepage ([www.sceis.sc.gov](http://www.sceis.sc.gov)), point your mouse to “Training” in the left-hand navigation bar, then select “SCEIS uPerform” from the menu that appears.

**SCEIS** South Carolina Enterprise Information System  
SC Budget and Control Board

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2. Select the “Business Process Procedures (BPPs)” link.

**ANCILE uPerform**

PROJECTS | GLOSSARY

## SCEIS Knowledge Sharing

Welcome to the SCEIS/ANCILE uPerform System - a resource to find, practice, disseminate, and...

**Business Process Procedures (BPPs)**  
This content area contains step-by-step instructions for performing SCEIS business process p (auto-playback and interactive), and a text-based BPP outline for quick reference. BPP conten tricks, helpful hints, and sample business scenarios detailing SCEIS transactions, procedures, Toolbar and clicking Help and "SCEIS Help". )

**Course Participant Guides**  
This content area contains the Participant Guides for online and face-face courses that intro their performance in particular business processes.

**Finance (FI) Miniguides**  
This content area may contain user guides for performing business processes or sub-processes Project Systems, Public Budgeting Formulation, and Treasury. The SCEIS processes document practice.

**Human Resources (HR), Time & Leave Management (TM), Travel (TV), and Payroll (PY) Miniguide**  
This content area contains user guides for performing business processes or sub-processes pe requires an end user to perform multiple business process procedures, reports and other tools

3. In the Sub-Areas section, a list of SCEIS business areas will display. Click the link to select the business area you wish to display.

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SCEIS Knowledge Sharing >> Business Process Procedures (BPPs)

## Business Process Procedures (BPPs)

This content area contains step-by-step instructions for performing SCEIS business process procedures (BPPs). Each instruction set consists of a comprehensive BPP overview document (webpage and PDF for printing), BPP simulations (auto-playback and interactive), and a text-based BPP outline for quick reference. BPP contents were designed and recorded by subject-matter experts to guide successful end user performance in SCEIS systems. BPPs contain tips and tricks, helpful hints, and sample business scenarios detailing SCEIS transactions, procedures, and best practices. (NOTE: SCEIS/ECC users can link to BPP documents while using the ECC system by going to the Help Menu on the ECC Toolbar and clicking Help and "SCEIS Help". )

### Sub-Areas

- Financial Accounting (FI)
- Funds Management (FM)
- Grants Management (GM)
- Human Resources Management (HRM)
- Materials Management (MM)
- MYSCEmployee (MSCE)
- Payroll Administration (PY)
- Project Systems (PS)
- Public Budget Formulation (PBF)
- Supplier Relationship Management (SRM)
- Travel Management (TV)

In the example below, the Sub-Area “Supplier Relationship Management (SRM)” was selected.

4. A list of SRM business processes and transactions will display. Select the topic you wish to display.

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## Supplier Relationship Management (SRM)

The State's business need requires development and implementation of a procurement process to enable management of supplier relationships, allowing the reduction of procurement spending and increase the overall profitability for the enterprise. The MM / SRM products bring functionality that will enable support of strategic sourcing, supplier enablement, operational procurement and the harmonization of all master data and information to support procurement and sourcing activities. [Also see the Materials Management content area.]

### Sub-Areas

- South Carolina Enterprise Information System (SCEIS) Vendor Guides
- SRM Employee Self-Services for Shopping Cart Creators
- SRM Home for Shopping Cart Approvers
- SRM MIGO Transaction for Goods Receivers
- SRM Monitoring and Reporting
- SRM Purchasing, Contracts and Bidding for Buyers

### Help Content

Show Filtered Documents ▼

None

In the example below, the topic, “SRM Purchasing, Contracts, and Bidding for Buyers” was selected.

5. Again, select the topic you wish to display.

The screenshot shows the uPerform website interface. At the top left is the ANCILE uPerform logo. To the right is a "Log In | Language (en\_US)" link. Below the logo is a navigation bar with "PROJECTS" and "GLOSSARY" tabs. A search bar with a magnifying glass icon and the text "Advanced Search" is on the right. The main content area has a breadcrumb trail: "SCEIS Knowledge Sharing >> Business Process Procedures (BPPs) >> Supplier Relationship Management (SRM) >> SRM Purchasing, Contracts and Bidding for Buyers". Below this is the title "SRM Purchasing, Contracts and Bidding for Buyers". Under the title is a "Sub-Areas" section with a list of links: "SRM PUR Adding Information to Purchase Orders", "SRM PUR Creating Purchase Orders", "SRM PUR Editing Purchase Orders", "SRM RFX Bidding", and "SRM SPUR Strategic Purchasing Contracts". At the bottom is a "Help Content" section with a "Show Filtered Documents" dropdown menu. The content area is currently empty, showing "None".

In the example below, “SRM RFX Bidding” was selected.

6. A list of “SRM RFX Bidding” BPPs will display. Select the BPP you would like to view.

The screenshot shows the uPerform website interface with the "SRM RFX Bidding" page selected. The breadcrumb trail is: "SCEIS Knowledge Sharing >> Business Process Procedures (BPPs) >> Supplier Relationship Management (SRM) >> SRM Purchasing, Contracts and Bidding for Buyers >> SRM RFX Bidding". The title is "SRM RFX Bidding". The "Sub-Areas" section is empty, showing "None". The "Help Content" section has a "Show Filtered Documents" dropdown menu. The content area displays a list of BPPs with links to "Hide Details":

- SRM PUR Create RFX from Shopping Cart (Hide Details)
- Create an RFX from a Shopping Cart.
- SRM RFX Create RFX Without Shopping Cart (Hide Details)
- Create an RFX without a Shopping Cart
- SRM SPUR Add Attachment to RFX (Hide Details)
- Attach any supporting documentation to an RFX
- SRM SPUR Add Question to RFX (Hide Details)
- Add a question to an RFX.
- SRM SPUR Create and Post No Award (Hide Details)
- Post a notification to vendors that the RFX (solicitation) was not awarded.
- SRM SPUR Create Questions for RFX (Hide Details)
- Create a special question(s) for an RFX.
- SRM SPUR Create Surrogate Bid (Hide Details)
- Perform Surrogate Bidding.
- SRM SPUR Issue RFX Amendment (Hide Details)
- Issue an amendment to an RFX.
- SRM SPUR Redistribute Shopping Cart to MMO or ITMO (Hide Details)
- Redistribute a Shopping Cart to ITMO or MMO for processing.
- SRM SPUR Redistribute Shopping Cart Within Agency (Hide Details)
- Redistribute a Shopping Cart to another buyer or agency for processing
- SRM SPUR Redistribute Workload (Hide Details)
- Assign a Requirement to another P-Group for processing.
- SRM ZMM Send Out Award Email Notifications (Hide Details)
- Send out Email Award Notifications.

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In the example below “SRM RFx Create RFx Without Shopping Cart” was selected.

7. The written instructions for the BPP will display in XHTML format. From the drop-down options shown below, the BPP can be displayed as a pdf by selecting “SCEIS Business Process Procedure (BPP) – pdf” or as a “Simulation (HTML) – html.” Note that “SCEIS Business Process Procedure (BPP) – xhtml” displays as the default. Select the format you wish to view.

The screenshot shows the uPerform web application interface. At the top, there is a navigation bar with 'PROJECTS' and 'GLOSSARY' links. Below this, a breadcrumb trail reads: 'SCEIS Knowledge Sharing >> Business Process Procedures (BPPs) >> Supplier Relationship Management (SRM) >> SRM Purchasing, Contracts and Bidding for Buyers Shopping Cart'. A dropdown menu is open, showing four options: 'SCEIS Business Process Procedure (BPP) - xhtml' (selected), 'SCEIS Business Process Procedure (BPP) - pdf', 'Simulation (HTML) - html', and 'Quick Reference (Step) - xhtml'. Below the dropdown, the title 'SRM RFx Create RFx Without Shopping Cart' is displayed. Underneath, there is a section titled 'When to Use This Business Process Procedure' and a 'Functional Area(s)' section listing 'Materials Management (MM), Supplier Management Relations (SRM) Purchasing (RFx)'.

In the example below, “Simulation (HTML) – html” was selected.

8. Next, select a tutorial method.

The screenshot shows the uPerform web application interface with the 'Simulation (HTML) - html' format selected in the dropdown. The main content area displays a tutorial titled 'SRM RFx Create RFx Without Shopping Cart'. The tutorial options are: 'Auto Playback Tutorial', 'Standard Tutorial' (selected), 'Self Test Tutorial', and 'RWD Assessment Tutorial'. Below these options, there is a 'Description' section stating 'Create an RFx without a Shopping Cart'. The 'Created by' field shows 'shanvey', and the 'Date Published' field shows 'Thursday, June 19, 2014'. The 'Copyright' field is empty. At the bottom, a note states: 'If you are experiencing difficulties viewing this simulation, please open the Adobe Flash Player Global Security Settings Panel and select the Always allow option.'

In the example below, “Standard Tutorial” was selected.

9. The Standard Tutorial provides step-by-step instructions. You can navigate the steps in any of the three ways below:

- By clicking the forward and back arrows located at the bottom of the screen
- By clicking the steps in the Step Window
- By clicking the actual icon, link etc. being highlighted by the callout box.

